

Green Financial Resources, LLC

# HERE to HELP

**LOOKING FOR MORE IN 2024?  
GET YOUR GREEN® IN ORDER!**

**PLANNING FOR YOUR FINANCIAL FUTURE?** Whether you're just getting started, working and raising a family, figuring out when you can retire, or enjoying life and harvesting assets in retirement; Green Financial Resources can help you every step of the way.

Roger Green, MSFS, CFP®, President/CEO of Green Financial Resources, LLC, (GFR) of Duluth, with over 35 years of experience working as a financial and investment advisor, and sons Andrew Green, CFP® and Michael Green, CWS®, are committed to guiding you toward financial success.

Most people go to a financial advisor for help with investment decisions, but partnering with an advisor should provide you with a trusted resource for so much more. Think of all the financial decisions you may face in life, far beyond how to invest: *How much home can I afford? How much life insurance do I need to protect my family? How should I allocate my 401k? Does a second home or rental property make sense for my situation? What can I do to lessen my tax burden? Should I pay off my mortgage? How should I prepare for college expenses for my kids? When can I retire? When should I start taking Social Security? How can I maximize my estate legacy when I pass?* The advisors at Green Financial are ready to partner with you to be that ongoing and knowledgeable resource you will need to help optimize your financial success.

*Investment Advisor Representatives offering securities and advisory services through Cetera Advisors LLC, a Registered Investment Advisor, Broker/Dealer, member FINRA, SIPC. Green Financial and Cetera Advisors are not affiliated. Chamber Pinnacle Small Business award rankings based on growth, revenue, community service, and other criteria with applications judged by a Chamber panel. Best of Gwinnett winners are chosen by Gwinnett Magazine via voting and editors' input, & opinions are vetted using other available information. Awards are not to be considered a guarantee of future results; nor as an endorsement by any client. No fees are paid to obtain any awards.*

Stellar service is an ongoing focus at Green Financial. Laura Green, COO, with assistance from Client Service Manager/Team Lead Kelly Schmidt – both with GFR for 20+ years, works to ensure exceptional service delivery across GFR's team of 3 advisors and 10 additional support staff. This team is dedicated to serving you.

Recognized for this excellence, GFR has received numerous awards including the 2016 Pinnacle Small Business of the Year Award from the Chamber, and they've been named a Best of Gwinnett by Gwinnett Magazine for 10 years (2014-2023).

Roger and GFR are also dedicated to giving back to the community. Over \$600,000 has been raised for worthy causes over 20 years of charity golf tournaments, and they've extended additional support to many other organizations. Roger's philanthropic work has earned him awards for his efforts in the community.

However, Roger finds the greatest fulfillment in helping others secure their financial futures. "I've witnessed people realizing their financial and retirement dreams, enriching the lives of their children and grandchildren, contributing to charitable causes - all through planning and investing. It's immensely rewarding", he adds.

**Act now to help secure your financial future by attending one of the retirement planning classes Roger's taught since 1997, or by scheduling a no-cost in-office or Zoom meeting. Simply visit [www.RogerSGreen.com](http://www.RogerSGreen.com) or call 770.931.1414. Regardless of your situation, Green Financial is here to help!**



GFR is, from left: Nicole DiBella, Tricia Fryman, Kelly Schmidt, Samantha Mangrum, Alby Crowe, Andrew Green, Roger Green, Laura Green, Michael Green, Laura Myers, Sarah Parks, Michelle Hawkins, Melanie Miller, and Beverly Gault (not pictured: Cathy Holbrook).



**RogerSGreen.com**  
**770-931-1414**

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**SCAN  
TO GO  
GREEN!**

